MODERN DCPDS PERSONNEL ACTION PROCESSING AID

INBOX CONCEPTS

Contents

Coverage

This document provides general information about inboxes and groupboxes in the modern DCPDS, including the following:

- General RPA and inbox concepts.
- Personal inbox vs. groupbox.
- Open and closed actions.
- Inbox views.
- Public vs. private views.
- The need to refresh your inbox.
- Description of the inbox, notifications, and PA routing history windows.

For more information

The following sources provide related information:

For information on…	See…
General information about the civilian inbox	Modern DCPDS User's Guide (May 2000) Module 1, Chapter 10.

Inbox Concepts

The RPA table

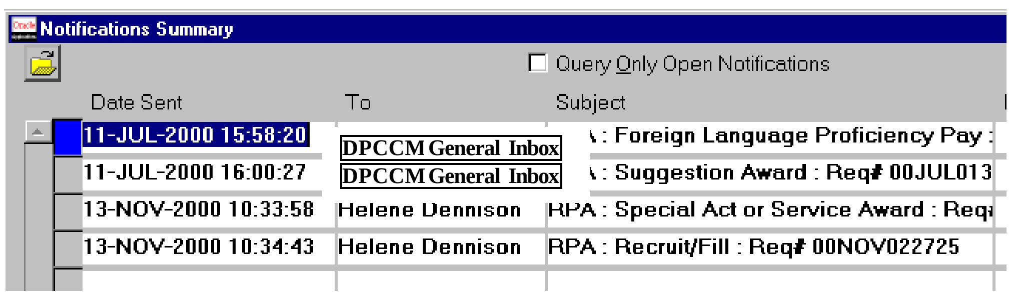
This is a simplified description of how RPAs and inboxes work in the modern DCPDS:

- All RPAs created within Tinker are stored as individual records in a large data file – called a *table* – on AFPC's Oracle HR server.
  - Note: to be technically correct, RPAs are actually stored in a number of interrelated tables, but for our purposes we can think of it as one large table.
- When an RPA is first created and saved (and a number assigned to it by the system), that RPA record becomes part of AFPC's RPA table.
- When you *route* (or *send*) an RPA, that RPA is not really <u>moving</u> anywhere. What you are actually doing is changing the permissions on that RPA record so that someone else can view and use it.
- When you view actions in your inbox, you are actually looking at the RPA records (from the central file of all RPAs) that you have permission to view.
  - When you modify an inbox view, e.g., apply a filter to view only certain types of actions, you are ONLY modifying your view of the RPA table – what RPAs are displayed – you are not modifying (or deleting) the underlying data. All the actions are still present in the RPA table.

Personal inbox vs. groupbox

In addition to having your personal inbox, many users (mostly personnelists, but sometimes other types of users as well) also belong to one or more *groupboxes*.

- A *groupbox* provides a single destination for RPAs when a user would not know the specific person to whom the RPA should be sent.
- A *groupbox* is an inbox that is shared by a number of users. These users are *members* of that groupbox.
- Actions that have been routed to a groupbox of which you are a member are visible to you. They are also visible in the inboxes of all the other groupbox members.
- When you open your inbox, it contains both actions that have been routed to you (personally) as well as actions that have been routed to any groupboxes to which you belong (the groupbox is not a separate inbox that you need to open). The actual “owner” of the action is shown in the “To” column of the inbox – which will contain either your user ID (Helene Dennison in the illustration below) or the name of the groupbox (DPCCM General Inbox in the illustration).



- If you display an RPA that was routed to a groupbox to which you belong, and then route it to your own personal inbox (using the “Save and hold in personal inbox” selection on the routing window), it becomes your action and will no longer be in the groupbox. Other members of the groupbox will no longer see the action as an open action.

Groupbox naming conventions

Groupbox naming conventions are established at each CPF. The following conventions are examples only.

- CPF groupbox names could begin with **“DPC”** followed by the specific section or branch. For example, **“DPCCO General Inbox” & “DPCCM General Inbox”** for Classification or **“DPCE General Inbox”** for Employee and Labor Relations. This naming convention could be used to invoke a system edit that would not allow RPAs to flow to those groupboxes unless they have been “signed” by an authorizing official.

Open and closed actions

In modern DCPDS, an *open* action is one that is currently assigned to your inbox (or to a groupbox to which you belong), and a *closed* action is an action that is currently assigned to another inbox, or an action that has been completed.

Rule: an RPA can only be *open* in one inbox at a time.

- An RPA can only be modified if it is in *open* status.
- The box can be a *personal* inbox, or a *groupbox*.
- Although the RPA can be viewed in any other inboxes (personal or group) to which it has been routed in the past, in these other boxes the RPA is *closed*. The action is "read only" in these other boxes.
- The only person who can modify an RPA is the person for whom the RPA is open – or, if it's in a groupbox, any members of that groupbox can modify the action.

Closed actions

When you open your inbox, you are able to view (and change) any RPAs that are presently *open* to you. To see *closed* actions, you un-check the "Query Only Open Notifications" box at the top of the inbox window, and re-query with the [**F8**] key. When you do this, your inbox will then contain both open and closed actions as indicated in the "Status" column of the inbox.

- The taskflow buttons at the bottom of the inbox are different for open and closed actions. Open actions have a <**Respond**> button, closed actions have a <**View Response**> button.
- Whenever you display a *closed* RPA (one that is open in someone else's inbox), you are seeing the RPA as it presently exists, including any changes that have been made to it since it left your inbox.
- Once an RPA has been processed ("update HR" has been completed), that RPA is *closed* to all users.
  - Note: You can still access a closed action (to make changes) if the effective date has not yet arrived, but you do this through the Cancellation/Correction process, not through the inbox.

Viewing your inbox

You can set up various *views* of your inbox:

- You can widen columns or make them narrower, hide columns that you don't use, re-arrange columns, and sort RPAs in different sequences.
- You can save different views of your inbox, with or without filters applied. When you save a view, you are just saving the *view* – not the actual RPAs in the inbox. Next time you use that saved view, you will see different actions (assuming that your inbox contents have changed).
- You can identify one view as your *default* view – the view that will automatically display when you open your inbox.
- You can set up any view to *automatically populate* (*auto-populate*) – so you don't have to *refresh* your box (with the [**F8**] key) when it opens.

Public vs. private inbox views

Inbox views can be saved as either <u>public</u> or <u>private</u>**. Users may want to make it a practice to save views as private**. This means that the view will be available on their list of inbox views but no one else at Tinker will have access to that view. If a view is saved as public view, however, that folder view will appear on the customized folders lists for everyone to view at Tinker. Individuals accessing your public folder would not be able to change it or delete it.

Filtering your inbox

You can *filter* your inbox view to exclude certain types of actions, or include certain types of actions. Examples:

- You could set up a filter so that you only see actions routed specifically to your inbox (excluding those that were routed to a groupbox to which you belong), or vice versa.
- You could set up a filter so that you only see Recruit/Fill actions.
- You can save these filtered views as part of or in addition to any other inbox views that you set up.
- Whenever you filter your inbox, you are not changing anything in the master file of RPAs. All you are doing is changing which of these actions you are displaying in your inbox.

The need to refresh your inbox

In the modern DCPDS, it is CRUCIAL that users refresh their inbox frequently (using the [**F8**] key). It does <u>not</u> refresh automatically (it does, however, refresh each time you close and then re-open it).

- <u>**Always**</u> refresh your inbox after routing an action from your inbox to another inbox. When you close the RPA form after routing and return to your inbox, the routed action will still be displayed until you refresh, and it is possible to re-open and re-route an action that is not really open in your inbox. This can cause problems!
- You should also refresh your inbox after processing an action into the database.
- If your inbox has been open for a length of time, refresh your inbox to see if new actions have arrived.

Simplified Example

The life of an RPA

Here's a simplified example of how the concepts of open/closed and personal vs. groupboxes apply:

Step	Action
1	Sam Supervisor creates an RPA to promote one of his employees. • When he saves the RPA to his inbox, it gets a system-assigned number. At that point, it becomes another RPA record on the Tinker table of RPAs. • When Sam opens his inbox, that new action is there, in *open* status. It belongs to Sam, he can open it and change it.
2	When Sam opens the new RPA from his inbox, he routes it to his boss, Mary Manager. • As soon as he clicks <OK> on the routing screen, that RPA then becomes *open* to Mary Manager. • Sam can view the RPA in his inbox, but he has to query for closed actions to see it, since the RPA is *closed* in his inbox.
3	When Mary opens her inbox, the new RPA is there, in *open* status. • She reviews the action, signs it, and sends it to Bob Budget, in the Resource Management office. • The action is now *closed* to Mary and Sam, and *open* to Bob.
4	When Bob opens his inbox, the RPA is there, in open status. • Bob does his RM thing with the RPA, and sends it to the appropriate *groupbox* belonging to the CPF.
5	Now the action is *open* in the CPF groupbox. • Any of the CPF staff who are members of the CPF groupbox can see the action when they open their inbox. It is in *open* status. • Any staff member can access the RPA from the groupbox. • If Joe Personnelist opens the action and then saves it in his inbox (using the **"Save and hold in personal inbox"** selection from the routing menu), it becomes *open* to him and *closed* to the other members of the groupbox.
6	The action gets routed to a groupbox in the CPF. • The action is now *closed* to everyone except the CPF members of the groupbox.
7	The RPA will probably be assigned to a specific person (who belongs to the groupbox) in the CPF. • When that person opens the RPA and saves it in their personal inbox, the RPA is then *open* to that person and *closed* to the other members of the groupbox.
8	When all processing is complete ("update HR" has been done), the RPA is *closed* to everyone. • Anyone who has had the action in their inbox, or in a groupbox of which they are a member, can continue to see the RPA indefinitely – but to do so, they must query for closed actions.

The Inbox Screen and Related Windows

Inbox columns

Most of the columns in the inbox are self-explanatory. You should be aware of the following, however:

- Some of the inbox columns will not have information in them. ## when and why?
- **Subject** shows the RPA number and type of action (family). The RPA number will generally include some information that identifies the originator's activity or installation (e.g., the CPO ID and the UIC, or some other identifying scheme as established by your base). This can be handy when querying for actions from a particular installation or organization.
- **Inbox name** shows whether the action is in your personal inbox or is in a groupbox.
- **Comment** can be used to record your own personal comments. This is accessed via the Notifications window (see below). **Any comments you add do not leave your inbox when you route the action.**
- **Status** shows if the action is open or closed in your inbox.
- The **Notepad** and **Coredoc** columns indicate if a note or core document are attached. The Coredoc column will never apply to Air Force, because we are not using the Modern DCPDS Coredoc.
- The **"Message"** area at the bottom of the screen provides more information about the currently-selected action (the action with the blue highlight **(current record indicator)** in the left-most column).

Inbox buttons

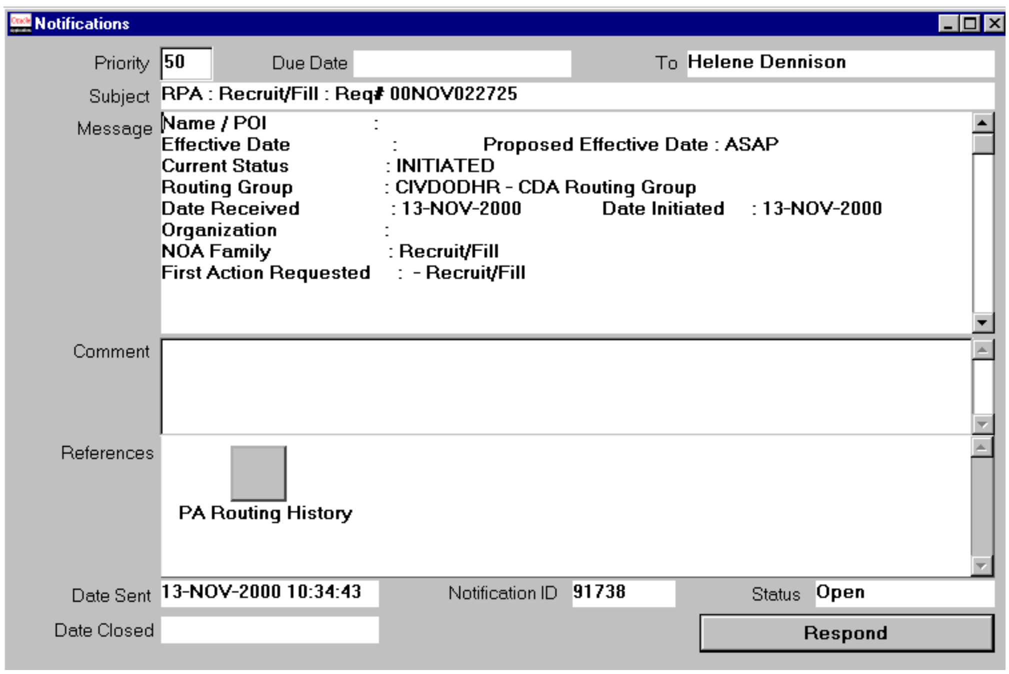
- The Edit Field icon on the toolbar can be used to display the contents of a column if all the information does not show. (You can also widen the column as described in "Customizing your Inbox Views," below.)
- The <**Open**> button at the bottom of the window opens the "Notifications" window that has detailed information about the currently selected action. You can toggle between the inbox and the notification window using the Summary/Detail icon on the toolbar.
- The <**Respond**> button is used to retrieve the RPA itself so you can view or edit it. If the action is closed, this button reads <**View Response**>. It still retrieves the RPA, but it is grayed out since it is read only.
- The <**Close**> button is displayed when you have an "Update HR Complete" notification in your inbox and is used to close that notification. You can also set up your inbox so that you don't see these notifications (see "Removing Update HR Complete Notifications").

The Notifications window

The Notifications window contains additional information about the RPA, including the employee name (if any), the RPA number, the organization, etc.

- Click the <**Open**> button to display the notifications window for the currently selected action, or use the Summary/Detail icon on the toolbar.
- Queries can be run in the “Subject” or “Message” area of the notifications window (see “Inbox Queries,” below).
- The <**PA Routing History**> button is used to display the routing history of the action (see below). This is how you can track an action to find out where it’s been and where it is currently located (if it is no longer in your inbox).
- The <**Respond**> button is the same as on the inbox screen – it opens the RPA form itself (if the action is closed, this button will read, <**View Response**>).

Notifications window illustration

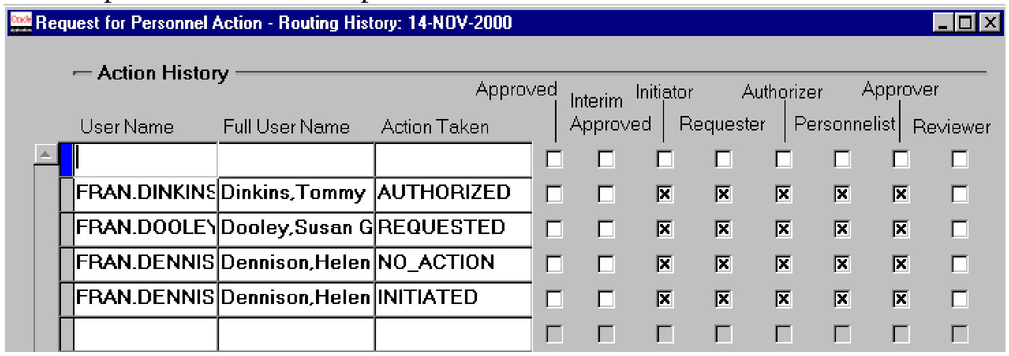


PA Routing History window

The PA (personnel action) Routing History window provides tracking data about the RPA. One entry is made in this window each time the RPA is saved or routed. The window contains three types of information (labeled at the top of the columns): Action, Routing, and Other, each described below. Use the scroll bars to move to the right to see all the information.

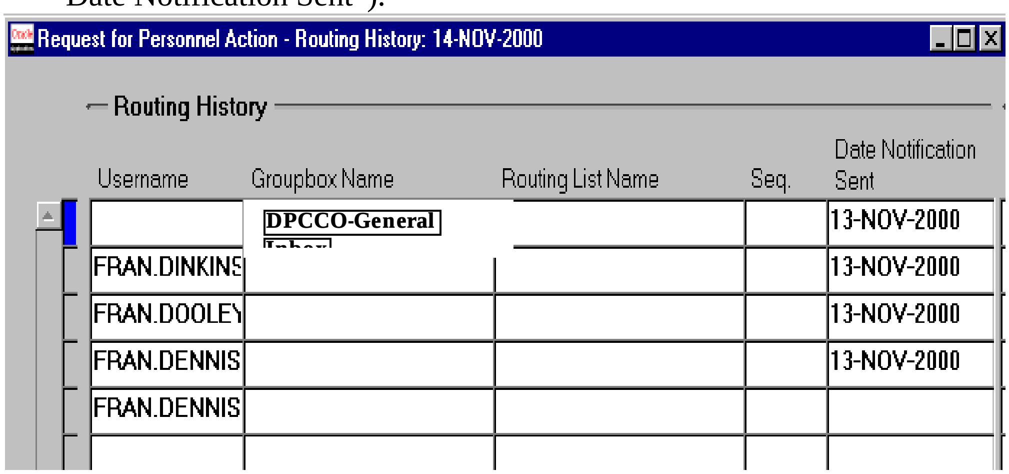
Action history This section of the PA Routing History window shows what action (if any) was taken during each routing.

- Shows what user took what action.
- Shows what a user is capable of doing based assigned priveledges.
- If Update HR has taken place it will show in the Action Taken column.



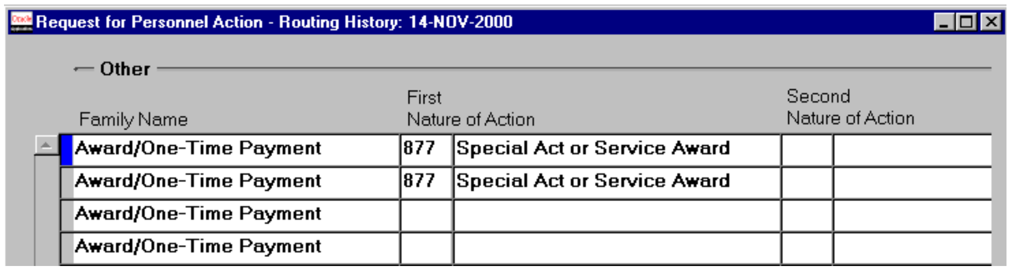
Routing history This section of the PA Routing History window shows who has had the action (either a person or a groupbox).

- The top entry in this section shows who currently has the RPA (either a person or a groupbox name) or who updated HR as the last action taken. In the illustration below, the action is currently open in the **DPCCO-GENERAL INBOX.**
- It also shows the date the user received the action (in the column labeled "Date Notification Sent").



Other This part of the PA Routing History screen contains:

- **Family name** – the type of personnel action.
- **Natures of Action** – these will only show once a NOA code has been entered onto the RPA.



- Notes that are on the Notepad (place cursor in this column and use the Edit Field icon on the toolbar to see more of the note).